

ENDOWMENT OFFICER

DISTINGUISHING FEATURES

The fundamental reason the Endowment Officer exists is to seek creative ways to supplement public funds and support community goals through a comprehensive endowment program. This program is administered through a unique partnership with the Arizona Community Foundation (ACF). The Scottsdale Community Endowment is one of twelve active affiliate organizations in the state. Work is performed under the general supervision of the Human Resource Systems Administrator.

ESSENTIAL FUNCTIONS

Seek charitable contributions that may include outright gifts of cash, publicly traded securities, closely held stock, real estate and other items of value as gifts or partial gifts to the community from individuals, families, companies and organizations.

Develops a reliable network of bank trust officers, attorneys and other financial advisors to create awareness of the endowment program. In conjunction with Communications and Public Affairs, the VP of Professional Services and the VP of Marketing with the ACF, continually works to generate ongoing, effective communications about the program.

Coordinates administrative and regulatory requirements with a variety of gift vehicles and fund types including trusts, annuities, bequests, donor advised funds, scholarship funds, non-profit endowment funds and support foundations.

Assists prospective donors and their advisors in clarifying objectives, obtaining and recording pertinent information, preparing and presenting appropriate proposals, and completing proper gift arrangements, protecting individual and program investments while creatively capitalizing on every opportunity.

Personally contact, develop, assist and serve each prospect individually to answer questions on giving to the endowment program, demonstrating value and respect for people in all situations.

Represents the Scottsdale Community Endowment and ACF at local professional gift-giving organizations and attends appropriate conferences; serves as Scottsdale's liaison to the ACF and Affiliate Council; coordinates and attends all meetings of the Scottsdale Endowment Board.

MINIMUM QUALIFICATIONS

Knowledge, Skills, and Abilities

Knowledge of:

- Asset types, giving vehicles, fund types and tax considerations
- Creative and effective marketing practices
- Fund raising processes and procedures
- Financial planning and estate planning processes

Ability to:

- Meet a wide variety of individuals and cultivate relationships
- Learn various computer programs related to charitable giving projections/proposals
- Listen and clearly explain program goals, objectives and advantages
- Be innovative, creative and resourceful, inspiring others to support and promote the endowment program

Maintain high ethical standards of conduct and to maintain confidentiality
Establish effective working relationships with business contacts, city staff, and the general public.
Operate a variety of standard office equipment, including a personal computer, a variety of computer software and other office equipment that require continuous and repetitive eye and arm or hand movement.
Present materials in a clear and logical format using proper sentence construction, grammar and punctuation.
Communicate effectively both orally and in writing.
Maintain regular consistent attendance and punctuality.

Education & Experience

Any combination of education and experience equivalent to a Bachelor's Degree in Business, Finance, Public Administration or related field and 2 to 4 years experience in fund raising, development, planned giving or foundation management.

FLSA Status: Exempt

HR Ordinance Status: Unclassified